SAM Release Notes
Build 2012-12-21 – v1.0

December 22, 2012

Change Log

Version #	Date of Change	Section	Description of Change	Changed By
1	12/22/12	All	Initial draft	Don Tennant

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1 Overview

This document summarizes the customer-facing changes that were made to the SAM application and database in the development window culminating in the build to production on December 22, 2012.

2 Release Notes

Description	Reference IDs
Added an additional feature in the left navigation panel to allow the user to view inactive registrations. Under "Register/Update Entity," Complete Registrations contains Active and Submitted registrations, Incomplete Registrations contains Draft and Work In Progress registrations, and Inactive Registrations will show Expired registrations (and for Help Desk, also Deactivated and Inactive registrations).	5210
Added email notifications to notify the user if the Admin/Help Desk changes a user's roles; previously emails were being sent out only in a specific role-change scenarios.	5196
Added the feature to display all addresses related to an exclusion on the screen when viewing that exclusion from search results.	6961
Broadened the Name-SSN/TIN search to include Firm Name searches as well as Individual Name searches.	6813
Improved CAGE validation process. Refined the TIN and CAGE processes to prevent records in certain situations from getting stuck in the process. Moved "stuck" records through the process.	6939, 6941, 6351, 5718, 6522
Made code changes to prevent a duplicate CAGE code from being applied across DUNS+4 values for a given DUNS.	6858
Made cosmetic changes to improve the usability of certain pages in IE7 specifically.	6340
Modified the display of Entity Management registrations to include Do-DAAC information (if pertinent to that registration) in page headers and the Core Data Review page.	5364
Performed data updates in accordance with exclusion upload requests	6881, 6744, 6879, 6883
Phone/Fax Validation: Added validation to phone and fax fields in Entity Financial Information and POC pages to ensure valid values are entered. Added validation to phone and fax fields to prevent non-numeric values (other than punctuation required for "(xxx)xxx-xxxx" format); this will support higher CAGE validation success rates. Added validation to the fax field on the POC Details page to prevent the user from entering an email address in the fax field.	5006, 5995, 6802
Refined the behavior of the web services so that the most recent state is returned (whether that is active or inactive), and if the user requests only active records and the most recent record is inactive, then "no results" are returned (and vice versa).	6973

Description	Reference IDs
Refined the Exclusion XML Upload service. Changes include: append new addresses rather than overwrite the old when using AddressInsert operation; handle AgencyIdentifierDel and AgencyIdentifierMod operations; handle legacy Classification types, which changed in SAM; prevent certain cases where duplicate records were being created; account for cases in which cross references were not being automatically created	6476, 6477, 6467, 6875, 6456, 6416
Refined the logic for capturing DBA name from D&B to account for exceptions.	6857
Removed the requirement for ABA Routing number for Federal Registrations unless the user chooses to enter EFT information.	6799
Repaired data migrated from a legacy system that was preventing the successful display of certain records.	5981
Repaired data to remove cases where the phrase "SELECTEDSTATE" appeared in the State field of certain records.	6635
Resolved issue in Reps & Certs Question 7 where the answer was defaulting to "No" instead of looking in the SAM Database to determine whether the DUNS number had any active exclusions against it.	6912
Resolved issue in the FAR and DFARS PDF files in which certain TIN-related responses were not being displayed.	4757
Resolved issue in which certain international registrants were unable to successfully enter their NCAGE code during Entity Management registration.	6967
Resolved issue in which certain POCs were not appearing in the extracts.	6823
Resolved issue in which Entity Administrators with responsibility for at least 1000 DUNS were not able to access a subset of the registrations for which they had the correct role.	6997
Resolved issue in which federal users performing EM registrations would have to enter the Agency Business Purpose each time the record was edited.	4742
Resolved issue in which for brief periods of time after record updates, duplicate records appeared in search results.	6918
Resolved issue in which new Entity Management registrations could be created without a primary ("base"/0000) DUNS+4 record.	6705
Resolved issue in which non-governmental Grants-Only registrations were incorrectly required to enter department code remittance information	4415
Resolved issue in which POC information was incorrectly removed from a draft entity registration which certain edits were made to the DUNS+4 information.	6622
Resolved issue in which search results appeared to vary depending on which search box the user entered the search query in.	6524
Resolved issue in which the Entity Management TIN filter does not return any search results for government users with FOUO/Sensitive permissions.	6794, 6911

Description	Reference IDs
Resolved issue in which the exclusion record creation date was being updated to match the record's update date.	6836, 6840
Resolved issue in which the name in the FedReg extract was displaying in all capital letters.	5613
Resolved issue in which the set of required fields when creating a System Account was not being correctly enforced/validated.	4998
Resolved issue in which users were allowed to complete an Entity Management registration without completing the mandatory "Business Start Date" value in the Business Information section.	6703
Resolved issue in which, when a Debarment Official creates a new exclusion, the exclusion would not be saved if the user chose to add more locations via the "Search More Locations" process step.	6966
Resolved issue in which, when completing SCI Report data, some actions associated with the contract DUNS were not displaying under certain circumstances.	6952
Resolved issue in which, when retrieving Reps & Certs data via Legacy ORCAXML web service (SOAP or POST), the foreign end product data should have been displayed but was not for some provisions (e.g. FAR 52.225-4, DFARS 2522257035)	6001
Restricted the data that could be entered in the certain fields during an EM registration to only numbers (fields were in Executive Compensation, Size Metrics, EDI Information, and Disaster Relief Information).	4708, 4497
Restricted the length of data that could be entered for certain Entity Management-related fields in order to match the maximums allowed per the approved data dictionary.	6886
Restricted users with the Office Registration Representative role to only allow them to create a new Entity Management registration at the hierarchy node at which their role was assigned, not at child nodes (e.g. if the user is an ORR at the agency level, could not register the node at the office level).	4498
Revised the home page and the search landing page to increase usability.	6880
Update FAR provisions 52.212-3, 52.225-4, and 52.225-25 in accordance with the new Federal Acquisition Circular.	6921
Update the hyperlink from SAM's help page to point directly to the free D&B page for federal government contracting registration.	6938
Updated the certifier's name to the user's name each time the FAR/DFARS responses are certified to.	6659
Updated the SAM User Guide to reflect SCI Reporting details and updates regarding the SBA Supplemental Pages.	7009, 6975